Office of Information Technology Services

Project Portfolio Management Tool

Hints and Tips

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1 Document History

1. Revision History

Revision #	Revision Date	Description of Change	Author
1.0	8/10/2005	Initial Document	J. Tulenko
1.1	8/24/2005	Various additions	J. Tulenko
1.2	11/23/2005	Clarified Cost Data Section Table contents, Document History same page	C. Richards
1.3	1/10/2006	Miscellaneous additions	J. Tulenko
1.5	3/24/2006	Added section about document management tab	C. Richards
1.6	3/28/2006	Updated Info About Status Reporting and Gate Review/Approval	C. Richards
1.7	6/19/2006	Updated Cost Data Section and Created new Schedule Section	B. Swartz
1.8	8/28/2006	Updated Cost Section with instructions to view Cost Centers	B. Swartz
1.9	9/20/2006	Updated General Navigation, Cost, Schedule and Project Approval Sections. Added Reports Section	B. Swartz
1.10	2/06/2007	Added instructions to format EXCEL reports for easier data analysis.	B. Swartz
1.11	4/04/2007	Updated Status Reporting	B. Swartz
1.12	6/26/2007	Added Change Request section	B. Swartz
1.13	7/20/2007	Updated Snapshot section	B. Swartz
1.14	01/07/2008	Added information on public filters and public reports	B. Swartz
1.15	01/30/2008	Added additional information on text fields	B. Swartz
1.16	2/27/2008	Corrected info in Cost Data section	B. Swartz
1.17	10/13/2008	Updated Cost Data section and added Alert information.	B. Swartz

2 Purpose

This document has been created to assist users of the Project Portfolio Management tool with various hints and tips on how to use the tool.

These hints and tips are a collection of suggestions on how to use the tool based on feedback from users on areas in the tool where they tended to misunderstand how to use the tool for certain tasks.

As users report additional issues with the tool, this document will be enhanced to explain common problems with the tool and how to overcome them.

3 PPM Tool Hints and Tips

3.1 Hints and Tips for using the PPM Tool

Initial Tool Use

- Only Internet Explorer is supported as a browser (Netscape, Mozilla, Firefox, etc are not supported)

- If you are typing in the web address of the tool (https://www.ppm.state.nc.us), don't forget the "s" in "https".

- For optimal viewing, your screen settings should be set to 1024 X 768.

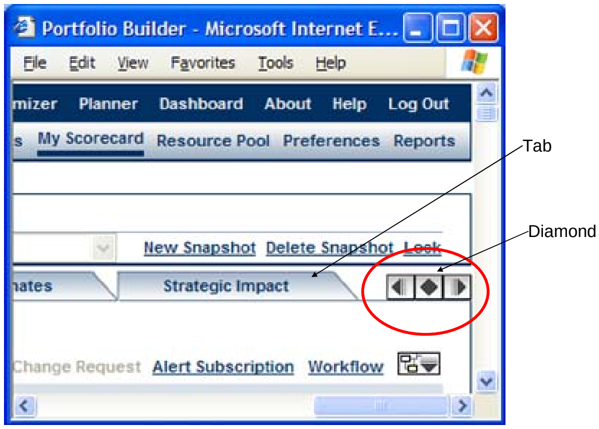
- If the tabs across the top of the page (when viewing a project) wrap to the second line, then you need to adjust your screen settings. Specifically, go to the "Display Properties" in Windows (right click on Windows Desktop and select "Properties"), select the "Settings" tab, click on the "Advanced" button and check for "DPI Setting" of "Large" (should be changed to "Normal").

General Navigation

- As mentioned in the training class, do not use "back" button on I.E. – you risk losing data and possibly having your session go to an unstable state.

- If the screen is still processing (I.E. icon moving in the upper right corner of the browser page), please be patient and wait until the function has completed its operation (I.E., "update"). If you start clicking around during an operation, unexpected results may occur.

- In general, the “cancel” button at the bottom of most of the tabs takes you completely out of the project (to move between tabs, use the tabs at the top of the page or use the “diamond” near the top, right-hand side of the screen).



- On several tabs, the same word is used on multiple buttons on a screen. Be careful to press the correct one (for example, when viewing an issue or risk, there are two “close” buttons – the bottom one closes the project and takes you back to the builder screen, the one above that closes that issue.

- Be sure to press “Update” if you have made changes to a tab before moving off it, just to be sure the change is in the tool (though the tool does automatically update when you change tabs). If you are in edit mode and are not sure if you made any changes, but did not mean to, press the “cancel” or “close” button at the bottom of the screen, go out of the project and back into it.

- Just like any Windows or Internet Explorer (I.E.) application, if you click on a field that has multiple choices, and scroll your mouse wheel up or down, the choices in that field scroll up and down, which can be a great feature. However, if you have highlighted a value in the field and scroll your mouse wheel to change the value in that field, make sure that you “deselect” the field before you use the scroll wheel to scroll to the bottom of the page or you may inadvertently change the value in that field.

  If you are in edit mode for a project and inadvertently change a field, and you then change from one tab to another, the tool will update the project with the changes you made on that tab (whether they were intentional or inadvertent).

  Bottom line is to be careful – if you are only viewing a project, then use “view” mode and you can’t make an inadvertent change. If you are in edit mode, be careful of what you change on a tab before moving on to another tab (you can always press “cancel” at the bottom if you aren’t sure if you made any changes to a tab, then go back into a project).

- If you click on the “date picker” (calendar) icon available on several of the tabs and the calendar window does not pop up, then most likely you previously had the calendar window up and it is hidden behind the main PPM tool window – find it by minimizing any other windows that you have open, close the calendar window and then go back to the PPM tool window and try it again.

- The maximum number of characters in the text fields is approximately 3,800. Anything beyond that will be truncated. If you need to add additional comments, create a WORD document, attach the document on the document management tab and reference that document in the text box.

- To avoid losing any data you entered into a project or application, click Update at least once every 60 minutes. Otherwise, the application will time out, and you will lose the data you have entered.

- If the application displays a Timeout Error message, click on Back. You will return to the application. If you click OK, you must log in again.

- A filter created as “public” can be modified or deleted by any tool user. To avoid losing your filter, create the filter as “private”.

- When creating an “Alert”, please be aware that the alert function only works for “Attribute Value Changed” and “Workflow Status Changed”.

Project Info Tab

- If you change the “Project Range” in the Project Info tab, you will send your project back to the Initiation Phase (the workflow that a project follows is directly related to the “Project Range”)

Document Management Tab

- When creating a new folder the default setting is to create the folder as ‘Private’. If the folder is created as ‘Private’ only the user who created the folder will be able to see it when they go into the Document Management tab. Once a folder is created as ‘Private’ you can **NOT** make it ‘Public’.

- To create a ‘Public’ folder make sure that you uncheck the box at the bottom left of the create folder window, where it says ‘Folder is Private’. The default setting is for the folder to be ‘Private’.

Cost Data

- On the Budget Cost Tab**,** the months listed include the Start Date through the End Date entered on the Project Info Tab plus 60 months for Operations and Maintenance.

- On the Cost Tracking Tab, the Cost Forecast dropdown months will include the Actual Start through Actual End Dates entered on the Schedule Tab plus 60 months for Operations and Maintenance.

- If changes are required to the Start and/or End Date on the Project Info Tab after budget numbers have been entered, delete any monthly budget cost numbers that would fall before the new Start and/or after the new End Date prior to changing the dates on the Project Info Tab. Otherwise, the cost tracking summary dropdown will continue to include these budget cost values.

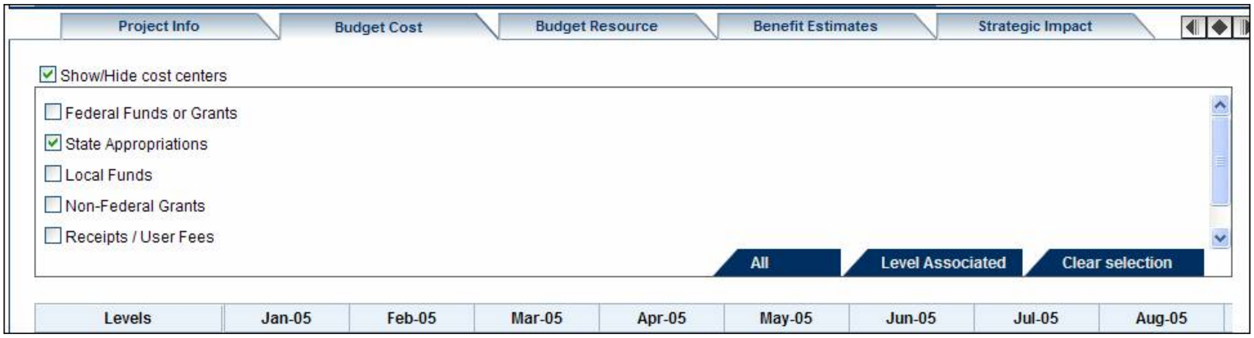
- If changes are required to a Phase Start and/or End Date that will change Actual Start Date or Actual End Date on the Schedule Tab after Cost Forecast numbers have been entered, delete any monthly budget numbers that would fall before the new Start and/or after the new End Date prior to changing the dates in the Phase. Otherwise, the cost tracking summary dropdown will continue to include these cost forecast values.

- In training, many people experienced the problem of trying to enter data into the budget cost matrix, where the row and column headers scrolled off the screen and made it difficult to determine the correct cell to enter data at level 4. With the latest update of the PPM tool the row headers have been fixed on the screen. The latest update has added another helpful function. If you hover over a cell with the mouse pointer a text box will appear telling you which column you are in.

- Another way to get around the problem of the column headers disappearing is to “collapse” the level 3 rows for all the level 3 rows except the one you are working with. This way the column headings stay on the screen and you can determine where you are in the matrix. To “collapse” a level 3 row (after “drilling down” to level 4), simply click on the “-” (minus sign) next to the level 3 row that you want to collapse, and the level 4 items that are under that level 3 row will be hidden from view (to expand the level 3 row back and see the level 4 items under it, simply click on the “+” (plus sign) next to the level 3 row).

- When the PPM Tool refers to ‘Annual Cost’, it is referring to fiscal year costs (July 1 → June 30). So Annual Costs for 2006 are for the time period of July 1, 2005 to June 30, 2006.

- To view the Cost Center associated with non editable data on the Budget Cost Tab or the Cost Tracking Tab, check the View/Hide Cost Centers box. The Cost Centers window displays. Check only one box at a time as you attempt to view the data. When the correct cost center box is checked, the cost data will display.



- During Status Reporting, if Actual Costs equal $0 for the month, on the Cost Tracking tab, enter $0 for the current month and click Update. If you do not enter a value, the Forecast amount will not be updated causing the Forecast to be incorrect.

Schedule

- The Actual Start and End Dates on the Schedule Tab are controlled by the earliest Phase Planned Start Date and latest Phase Planned End Date.
- The Milestone Start and End Dates on the Schedule Tab are controlled by the Start and End Dates on the Project Info Tab.

Project Approvals

- As a contributor, before you sign off on your project to move it forward in the workflow for approval, make sure you do not have any red fields in the workflow window. If you do, the project will not move forward to the approvers until values are added for these fields. The exception to this is if there are multiple contributors and one of the other contributors is responsible for those fields.
- To satisfy the Detailed Cost Estimate requirements for Project Gate Approval on the workflow page, it may be necessary to add zeros to some fields on the Budget Cost tab. It is only necessary to add zeros in **one** monthly column. The simplest way to do this is as follows: On the Budget Cost Tab, select Drill Down Level 4. Check Show Cost Centers. Scroll through the list of cost centers and uncheck all but one. (This allows you to update costs in line rather than in the pop up window.) Click Update. Scroll all the way to the right of the cost matrix. Look at the last monthly column (next to the Total Column). Enter zero in each

row for which zero displays in the Total column. Click Update. **Note:** If the budget data in the last monthly column was not entered at Level 4, and you enter zeros at level 4, the level 3 data in the last monthly column will change to zero.

- Whether an agency or statewide approver is approving or rejecting a project, they still "signoff" on the project from the workflow window. This will bring up another window that let's them choose whether this signoff is an approval or a rejection.

- Agency and statewide approvers can sign off on a project (to reject or approve) in "view" mode or "edit" mode.

- Status Reports can now be completed and assessed while projects are in an approval state.
  - The specific tabs which are now editable include:
    - Risk Assessment Tab
    - Schedule Tab
    - Status Tab
    - Cost Tracking Tab
    - Issues and Risk Management tab
    - Document Management tab
  - The following tabs will continue to be read-only during approval states (however, these tabs are not typically changed in order to complete status reporting):
    - Project Information Tab
    - Benefit Estimates Tab
    - Budget Cost Tab
    - Strategic Impact Tab
    - Budget Resource Tab
    - Resource Tracking Tab

Change Requests

- Change Request costs cannot be added to months prior to the current month. If you must enter a Change Request for a prior month, simply add the Prior Month(s) Change Request amount to the current month in the appropriate phase. Enter the total amount (prior month(s) change request amount plus amount for the current calendar month) in the appropriate current calendar month cell on the Change Request Cost Breakdown tab.

- The first month displayed in the Change Request "Cost Breakdown" tab is the month in which the Change Request was entered.

- The last month displayed in the in the Change Request "Cost Breakdown" tab is based on the "Actual End Date" in the Schedule tab plus the number of months in the "Capitalization Period" on the Project Info tab. This is different than the last month you see on the Budget Cost tab, which is based on the "End Date" on the

Project Info tab (plus the Capitalization Period) rather than the Schedule Tab date. However, it is the same as the Cost Forecast's last month.

Snapshots

- To view a snapshot, enter the project by clicking on View. The user cannot see a snapshot when in Edit mode.

- The snapshot feature of the tool only preserves the information in certain tabs (specifically, the Budget Cost tab, Status tab and Cost Tracking tab). If you use View mode and look at a previous month's snapshot, or run a status report from a previous month, you will see a mixture of the data from that month in the Status and Cost Tracking tab with the current data on the other tabs.

Reports

- Acrobat Reader 6.0 is required for pdf reports. If "hieroglyphics" are displayed when viewing a pdf file, check the version of Acrobat Reader on your computer by clicking on the Help tab. If the version is less than 6.0, you need to upgrade to version 6.0.

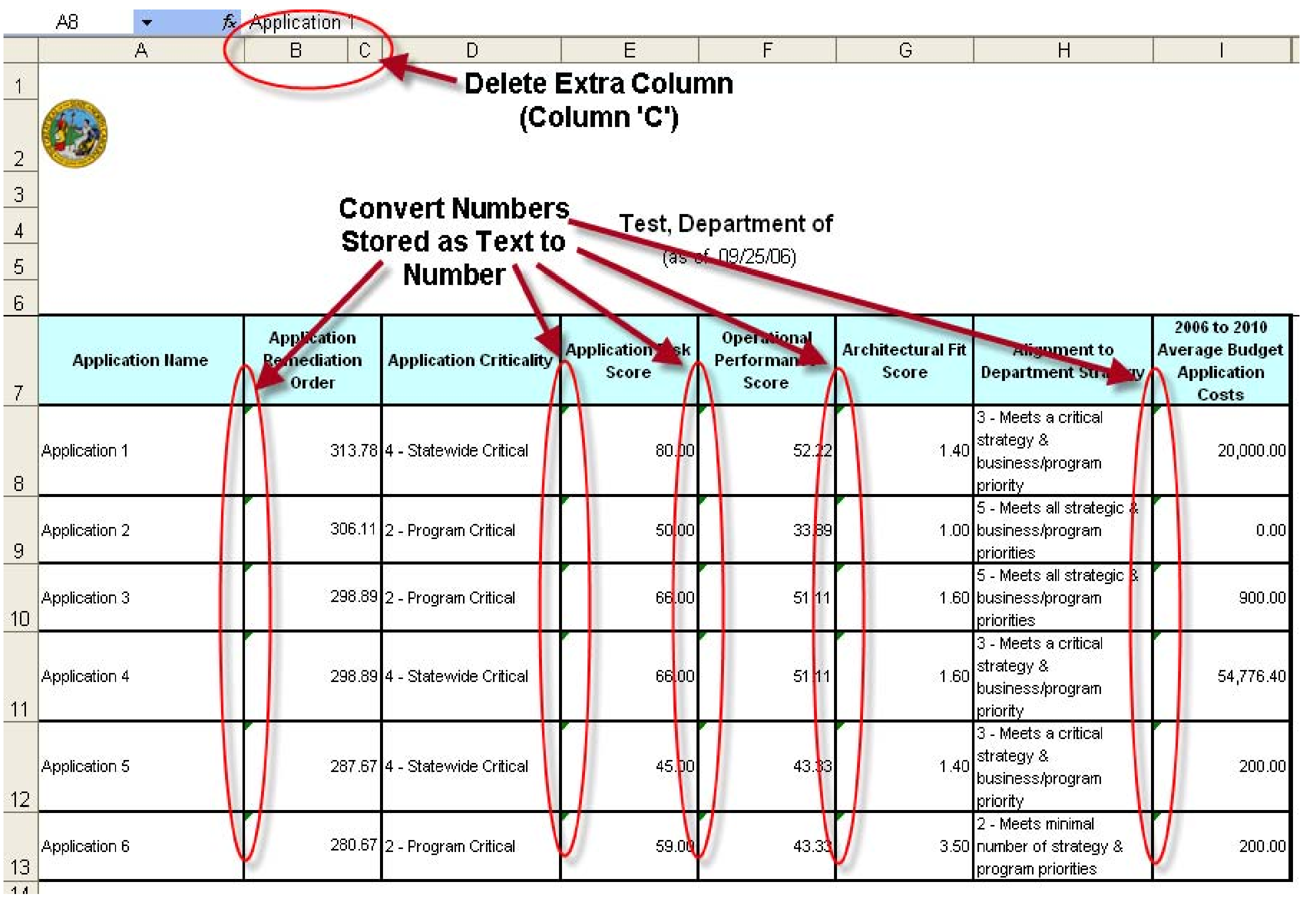
- Public reports
    - Any user can run a public report and view the data.
    - Any user can delete a public report.
    - Any user can make a public report private, which removes it from public view.

  Before sharing a report by making it public, save a private copy. Everyone who wants the report should save a private copy. Delete the public report as soon as you are finished sharing it.

- Formatting EXCEL reports allows the user to more easily manipulate data for analysis. See example on following page.

    - Delete blank rows at top of report
    - Select cell to the right of first cell containing data
    - Select Windows -> Remove Split
    - Select Windows -> Freeze Panes
    - Select and Delete Extra Columns (See example below)
    - To set up sort in EXCEL 2003, select Data -> Filter -> Auto Filter
    - To set up sort in earlier versions:
        - Position cell pointer on first field name of database
        - Click on Data - > Sort
        - Select field to sort
        - Click OK

- Convert numbers stored as text to numbers (See example below)
    - On the **Tools** menu, click **Options**.
    - On the **Error Checking** tab, make sure that the **Enable background error checking** check box and the **Number stored as text** check box are both selected, and then click **OK**.
    - On the worksheet, select any single cell or range of adjacent cells that has an error indicator in the upper-left corner .
    - **Note**: All cells in the selection must be adjacent.
    - Next to the selected cell or range of cells, click the error button and then click **Convert to Number**.
- SAVE



Application Name	Application Remediation Order	Application Criticality	Application Risk Score	Operational Performance Score	Architectural Fit Score	Alignment to Department Strategy	2006 to 2010 Average Budget Application Costs
Application 1	313.78	4 - Statewide Critical	80.00	52.22	1.40	3 - Meets a critical strategy & business/program priority	20,000.00
Application 2	306.11	2 - Program Critical	50.00	33.89	1.00	5 - Meets all strategic & business/program priorities	0.00
Application 3	298.89	2 - Program Critical	66.00	51.11	1.60	5 - Meets all strategic & business/program priorities	900.00
Application 4	298.89	4 - Statewide Critical	66.00	51.11	1.60	3 - Meets a critical strategy & business/program priority	54,776.40
Application 5	287.67	4 - Statewide Critical	45.00	43.33	1.40	3 - Meets a critical strategy & business/program priority	200.00
Application 6	280.67	2 - Program Critical	59.00	43.33	3.50	2 - Meets minimal number of strategy & program priorities	200.00